

I Scope of Work

I.1 Project Phases

The critical initial step in crafting a concise and user-friendly set of regulations is close work with City staff to identify framework choices – the overall structure of the new development regulations. The challenge is to create a logical sequence, remove ambiguity, simplify and clarify language, and, to the extent possible, create common procedures and uniform regulations and standards. With this in mind, our approach to a comprehensive update of the Santa Barbara Zoning Ordinance is to break down the project into major phases, as outlined below and shown on the attached timeline.

Phase I – Diagnosis and Technical Analysis. Background studies, including technical review of current regulations, stakeholder input, and summary of issues to be addressed.

Phase II – Framework for New Zoning. Analysis of issues and preparation of an outline reflecting the framework for a new zoning code that will implement the General Plan, consider proposed Coastal Land Use Program, and be easier to use and understand.

Phase III – Products. This phase includes drafting preliminary regulations to implement the General Plan and other city policies and reflect current best practices, building on the City-staff approved outline and technical revisions identified by City staff. Meetings to review the “modules” of preliminary regulations with City staff, the NZO Joint Committee, and community workshops with the Planning Commission will be scheduled to provide feedback. Then a public review draft will be prepared for hearings and adoption.

Phase IV – Hearings and Adopted Ordinance. This includes preparation of materials for hearings, attendance at public meetings, as well as preparation of the adopted Ordinance.

I.2 Scope of Work

By moving from agreements on general approaches to the outline of specific regulations and then agreements on specific sections (“modules”), our work program involves City staff and the community in the update process and generates a sense of ownership and commitment to the new regulations. Although our work program is designed to address problems throughout the entire body of zoning regulations, the primary emphasis will be addressing issues related to implementing the General Plan, correcting technical deficiencies, and reflecting current best practices. We will focus on changes to the zoning regulations that staff and decision-makers believe most important to meeting the City’s needs. Particular attention will be given to identify the sections of the ordinance that are not planned to be completed as part of this effort as determined by staff and decision-makers. Amendments to these sections will be limited to minor clarifications for consistency and a consistent format style.

TASK 1: PROJECT INITIATION AND BACKGROUND RESEARCH

- A. **Kickoff Meeting.** Meet with City staff to discuss their ideas and aspirations for the project, review the approach to the new Zoning Ordinance, discuss the public participation process, finalize the work program and schedule, and clarify roles and responsibilities. Following the kick-off meeting with staff, conduct a kick-off meeting with the NZO Joint Committee.
- B. **Field Trip.** During the same trip as the kick-off meeting, tour the City with City staff to become familiar with the physical details of development representing implementation of the current regulations.
- C. **Technical Review.** Conduct a technical review of the City's existing zoning regulations, General Plan, and other relevant plans, regulations, and documents. Identify conflicts with new requirements of State and federal law, if any.

Meetings: Kickoff meeting with City staff and the NZO Joint Committee (meeting #1)
City Tour

TASK 2: PUBLIC PARTICIPATION

- A. **Community Meetings/Workshops.** Work with City staff to formulate a Public Participation Program for the NZO project. We envision a series of community workshops/meetings at key stages during the planning process to provide opportunities for public education and informal comment on choices being considered. These will be conducted in combination with the Planning Commission as study sessions. Straightforward and informational outreach materials will be created. We propose to conduct five workshops during the planning process, which will include:
 - **Workshop #1: Issues and Options.** An issues and options workshop will present the project goals and discuss the major issues, General Plan direction for new zoning, and distill the key choices and presents the "big ideas" for consideration of a new zoning framework for Santa Barbara. The presentation will include photographs and graphics (e.g. diagrams of typical standards or excerpts of site plans) of specific zoning issues in Santa Barbara and examples of how peer communities may have resolved similar issues. This workshop would be conducted as part of Task 3.
 - **Workshop #2: Use Regulations.** A workshop will be held to present and review Module #1: Use Regulations. The purpose of the workshop is to gather comments and get feedback on the preliminary draft recommendations prepared in Task 4.
 - **Workshops #3 and #4: Development Standards.** Workshops will be held to present and review Module #2: Development Regulations. The purpose of the workshops is to gather comments and get feedback on the preliminary draft recommendations prepared in Task 5.
 - **Workshop #5. Administrative Procedures.** A workshop will be held to present and review Module #3: Administrative Procedures. The purpose of the workshop is to gather comments and get feedback on the preliminary draft recommendations prepared in Task 6.
- B. **Stakeholder Outreach Review.** Review of City staff notes of the outreach to stakeholder groups during May and June. Issues identified by the stakeholders will be

classified and sorted to identify common themes and shared concerns. Include a final “punch list” of issues and options based on the comments, organized by topic in the Issues and Options paper in Task 3.

- C. **Press and Media Releases.** Draft press and media releases which can be distributed to local media at key benchmarks in the process and in advance of workshops and other public forums.
- D. **Website Materials.** Provide information for the City’s website, including text, photographs, maps, renderings, other images, and information to describe our credentials and explain the project’s process. Project memorandum and milestone documents may be uploaded to the website to be accessed by interested community members.

Products: Public Participation Program
Workshop Materials
Information for the City’s website
Draft press and media releases

Meetings: Workshop #1: Issues and Options
Workshop #2: Use Regulations
Workshop #3 and #4: Development Standards
Workshop #5: Administrative Procedures

TASK 3: ISSUES AND OPTIONS; ORDINANCE RESTRUCTURE

- A. **Issues and Options.** Based on technical review of the City’s zoning regulations, City staff comments, and focus group input, prepare a short Issues and Options paper that highlights General Plan direction for new zoning, distills the key choices and presents the “big ideas” for a new framework for zoning controls in Santa Barbara. The Issues and Options paper will include options for reformatting the code. Include specific zoning issues in Santa Barbara and examples of how peer communities have resolved them.
- B. **NZO Joint Committee Meeting.** Meet with the NZO Joint Committee to review and get feedback on the Issues and Options paper.
- C. **Annotated Outline.** Based on comments on issues and options and other input made at Workshop #1, prepare an Annotated Outline of the New Zoning Ordinance (NZO) with a “plain English” commentary. The outline will provide the recommended restructuring of the current code; retaining, amending, or discarding sections as necessary and proposing new sections where needed to improve clarity and user-friendliness. The outline will lay out the new framework of the revised Zoning Ordinance and will be in sufficient detail to indicate what changes will need to be made to the structure of the ordinance so that it is clear, consistent, easy to use and understand, and eliminates redundancy, including:
 - The proposed number, types, and purposes of zoning districts. The usefulness of each base and overlay district will be confirmed. Where possible, similar zones will be combined. As a general rule, the total number of zones within the ordinance should be minimized;

- The general purpose sections of the new ordinance, including definitions, provisions for “use classifications,” supplemental standards applying in some or all districts, administration, and enforcement; and
- The overall organization and numbering system.

The outline will include a disposition table showing how the contents of the current ordinance would be reorganized in the New Zoning Ordinance. The outline will also clearly identify the sections or topics that are part of the zoning ordinance but that will not be updated or revised as part of the NZO effort (i.e. the items listed as “Not Included in the Scope of the NZO Effort” in the RFP). We will review the Annotated Outline with staff and City Attorney; and revise, based on comments received.

Products: Issues and Options Working Paper
Annotated Outline

Meetings: NZO Joint Committee (meeting #2)

TASK 4: USE REGULATIONS

- A. **Review Current Use Classifications.** Evaluate merits of a “use classification” system to streamline zoning district use regulations and prepare preliminary use classifications for City staff review. A “use classification” system places land uses and activities into groups based on common function, product, or physical characteristics. There are many advantages to this type of approach. Listing use groups instead of specific uses helps streamline the use regulation parts of the code. Categories are also broad enough to allow classification of new, unanticipated uses.
- B. **Evaluate Current Use Regulations.** Evaluate current use regulations and identify changes needed to respond to how people presently live and work and to staff and stakeholder concerns identified in the technical review. Evaluate permit review requirements for each use and identify opportunities for allowing uses with a lower level of processing, such as more uses allowed by right or with a Performance Standard Permit instead of a Conditional Use Permit. The NZO could also identify set of “limited” uses which function as permitted uses so long as they conform to certain development standards or do not exceed threshold intensities.
- C. **Present Use Regulations in a User-friendly Manner.** Use regulations could be arranged in tables with extensive cross-references to present information in a logical, consistent, and easily navigable format. The current “pyramid zoning” structure can still be retained. Tables could present the use regulations for multiple zones side-by-side to facilitate comparisons between similar zones and to ease user navigation. The uses listed in each table would be presented without definitions or limitations in order to prevent visual clutter and allow quick access to required information. Instead, the tables identify any limitations to uses as footnotes and, where appropriate, include cross-references to other sections of the code (e.g., the standards for specific uses) where additional regulations can be found. Evaluate thresholds for review and identify projects that could be reviewed at an administrative level by staff, design boards, or the Staff Hearing Officer.

D. **Evaluate Current Specific Use Standards.** Evaluate current standards for specific uses, including City staff concerns about “problem” uses and provisions that are inconsistent with State and federal law or out of date with current best practices. Draft revisions to the current use standards to address concerns and inconsistencies. Some uses and development types that may require particular consideration include:

- Automobile and vehicle repair and services
- Home occupations
- Live-work, including artist’s live-work space
- Corner stores/small neighborhood centers
- “Green” economic development
- Community gardens
- Eco-tourism
- Outdoor dining
- Visitor-serving uses
- Storage containers
- Industrial and light manufacturing uses

E. **Prepare Module #1: Use Regulations.** Prepare Module #1: Use Regulations, including a summary of proposed changes and a correspondence table comparing existing uses with proposed use classifications. Review Module #1 with staff and revise, based on City staff comments.

F. **NZO Joint Committee Meeting.** Participate in a meeting with the NZO Joint Committee to review Module #1: Use Regulations. Revise the module based on NZO Joint Committee feedback and City staff direction.

Products: Module #1: Use Regulations

Meetings: Module #1 review with NZO Joint Committee (meeting #3)

TASK 5: DEVELOPMENT STANDARDS

A. **Analyze Current District Development Standards.** Analyze current development standards and identify standards that need to be revised or rewritten to clarify intent, implement City goals and policies, correct deficiencies, or that are contradictory with other regulations. Identify the process and circumstances under which development standards may be waived or modified. Minor modifications may be able to be granted administratively, subject to certain criteria or if specific findings can be made. Identify development standards that are not in compliance with the most current legal decisions by the U.S. Supreme Court and the U.S. District Courts of Appeal. Incorporate any development standards currently located in definitions.

- B. **Analyze Current City-wide Development Standards.** Analyze current development standards that apply in some or all districts and identify new or revised standards and performance requirements to respond to staff and community concerns, implement the General Plan, and bring standards up to date with current uses and practices. Topics include, but are not limited to:
- Landscaping
 - Nonconforming provisions
 - Parking
 - Performance standards
- C. **Prepare Module #2: Development Standards.** Prepare Module #2: Development Standards, including a summary of proposed changes. Review Module 2 with City staff and revise, based on City staff comments.
- D. **NZO Joint Committee Meeting.** Participate in a meeting with the NZO Joint Committee to review Module #2: Development Standards. Revise the module based on NZO Joint Committee feedback and City staff direction.

Product: Module #2: Development Standards

Meeting: Module#2 review with the NZO Joint Committee (meeting #4)

TASK 6: ADMINISTRATIVE PROCEDURES

- A. **Evaluate Existing Administrative Procedures.** Evaluate existing administrative provisions for all zoning decisions and identify opportunities for streamlining. Include procedures, criteria, and any required findings for approval or denial by the appropriate decision maker and explore an administrative/consent Staff Hearing Officer review for minor improvements. Procedures for citizen participation in the development review process will also be evaluated.
- B. **Consolidate and Update Definitions and Rules of Measurement.** Update definitions, including appropriate illustrations, and rules for measuring various dimensions referred to in the Ordinance such as building height, floor area ratios, setbacks, and lot dimensions, as needed. Update definitions to use plain language and be consistent with definitions of other sections of the Municipal Code, Building Code, and other documents. Group like terms under headings to facilitate understanding of differences among terms. Prepare a summary list of terms and cross-references for readers, similar to an index. Development standards will be removed from the definitions section and placed in the appropriate section of the ordinance.
- C. **Prepare Module #3: Zoning Administration.** Prepare Module #3: Zoning Administration, including proposed amendments to administrative provisions, definitions and rules of measurement; review with City staff and revise, based on City staff comments.

- D. **NZO Joint Committee Meeting.** Participate in a meeting with the NZO Joint Committee to review Module #3: Zoning Administration.

Product: Module #3: Zoning Administration

Meeting: Module #3 review with the NZO Joint Committee (meeting #5)

TASK 7: DRAFT NEW ZONING ORDINANCE

- A. **Draft Zoning Ordinance.** Review all comments on “modules” of preliminary regulations and prepare the Public Review Draft of the New Zoning Ordinance. Prepare an Administrative Draft for City staff review and revise based on a consolidated set of comments. We will work closely with City staff and the City Attorney to prepare the Public Review Draft; meetings and/or conference calls will be scheduled to review outstanding issues.
- B. **Public Review Materials.** Assist City staff in preparing staff reports and presentations for the formal public review and adoption process.

Products: Public Review Draft Zoning Ordinance
Public Review Materials

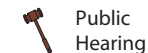
TASK 8: PUBLIC REVIEW AND ADOPTION; FINAL ZONING ORDINANCE

- A. **Planning Commission Meetings.** Attend, prepare materials for, and make formal presentations at two Planning Commission meetings on the Public Review Draft Zoning Ordinance.
- B. **Planning Commission Recommended Draft.** Revise the Public Review Draft Zoning Ordinance based on comments from the public and the recommended changes from the Planning Commission.
- C. **Council Ordinance Committee Meeting.** Attend, prepare materials for, and make formal presentations at a Council Ordinance Committee meeting on the Planning Commission Recommended Draft Zoning Ordinance.
- D. **City Council Meeting.** Attend, prepare materials for, and make formal presentations at a City Council meeting on the Planning Commission Recommended Draft Zoning Ordinance.
- E. **Final Zoning Ordinance.** Based on City Council action and final text changes provided by City staff, prepare the final Ordinance. The document will be produced in a Word or InDesign format and will include hyper links to sections of the zoning ordinance being referenced.

Products: Planning Commission Recommended Draft Zoning Ordinance
Final Zoning Ordinance

Meetings: Planning Commission (2)
Council Ordinance Committee (1)
City Council (1)

Santa Barbara New Zoning Ordinance



PC Planning Commission
OC Council Ordinance Committee
CC City Council